

Guide for Retailers

With MyBusiness you can:	EasyBooks	Essentials	Complete Manager
Invoicing to Customers	Y	Y	Y
Analysing Sales by category	Y	Y	Y
Managing Stock and create Price Lists	N	Y	Y
Email/ Mail shots to your contacts	N	N	Y
Use your Diary to set up appointments or tasks	N	Y	Y
Be reminded of late invoices and create automatic Reminder Invoices	N	Y	Y
Manage your Vat	Y	Y	Y

If you have a business in Retail, you will know how important organisation and reliability is. Constant communication with customers and suppliers is vital to ensure a competitive edge and success for your business. My Business is the perfect management tool to help look after your business; from your contact and finance management to supervising the marketing and promotional side of your business.

Income and Expense categories:

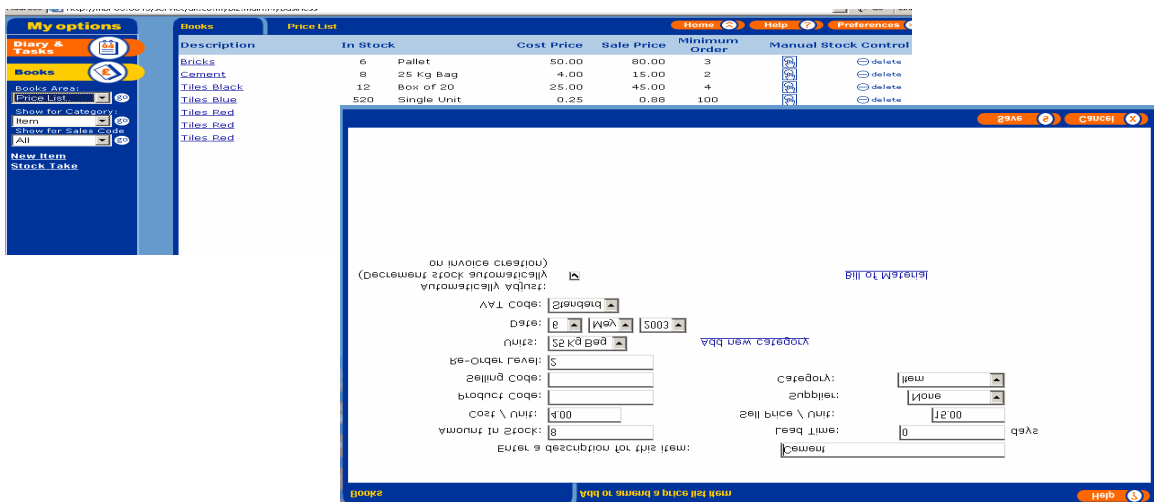
It is very important to keep track of where you spend and make your money. Analyse your sales by category by setting up income and expense categories. Go to Books / Income and Expense / Add Sub-category. This might be for example: CDs, flowers, food, cigarettes bags or papers. Once you have created the necessary sub-categories, you will be able to view detailed reports for each. Go to Books / Reports / Report by Category. This allows you to track which area of your business is providing the greatest profit.

Cashing in the day's takings:

Go to Books / Receive Cash into an Account. Describe the receipt as, for example; "days takings" and then use the category of sales you set up for example; CDs, flowers, or bags. The receipts will then appear in your 'Cashbook'. You can also receive cash into an account by payment from invoices, Go to 'Books Main Menu' then 'Receive payment for an invoice' again use your categories to help report where you are making money.

Stock Management:

Go to Books / Price List / New Item to set up items you sell. Put in your cost and selling prices. Include a minimum reorder level. Tick the Automatic Adjust box so that Complete Manager adjusts stock levels when you do customer invoices. You can also adjust stock levels though the 'adjust stock' option.



Diary:

Use the Diary to set up appointments or tasks such as Special Orders for example, Weddings, which you can then link to specific customers.

Appointment Bookings:

Set up employees in Contacts so they can have their own colour coded diary entry. This can be used to schedule appointments for example; Hairdressing, dress fittings etc

Contacts:

Use Contacts to create quotes, invoices, and payments or set up order reminders. Go to Contacts / Add a Contact. This area can also be used to create future reminders to contact customer e.g. anniversaries etc.

Projects:

Use Projects to track all major orders or regular customer activity. All of your transactions and activities can be linked to projects. You can also set budgets for customers or yourself.

Mailings:

In Complete Manager you can set up and send mail and e-mail shots for customers e.g. "Closed for holidays" or "Seasons Special Offers" or new prospect mail shots.

We hope that you have found this guide useful. If you would like more information or additional guides please ring 08451 20 30 40 or visit www.mybiz.co.uk